

Agents

You can assign an **Agent** (A person's name) to one or more numbers. To do this click on **Personal** then click on **Agents**. Next click on **Add Agent**

Call Record Web Portal

SIGN OUT

Dashboard > Agent Management

Welcome
Henry Jackson

Dashboard

Recordings

Analytics

Personnel

Agents

Departments

Users

Roles

Reports













Payment & Billing

Configuration

Agent Management

You can manage and maintain a list of your organisation's agents through this sections. Agents are assigned recording enabled numbers allowing for a collection of detailed usage metrics generated from the collected recordings.

FILTERS

Name	Department	Score	
Alex	Support	0	  
Tracy		0	  
Marcus	Support	0	  
Ben		0	  

Rows per page: 15 1-4 of 4

Using **Agents** will display the name on the **Recording Archive** page when a recording has been made with that Agent. You can also use the Agents to filter on. These will also be used for the **Analytics** and **Scorecards** once they become available in a future update.

On the **Create Agent** page add a Name for the agent, if you have departments configured select a department. Next select the **Number(s)** you would like to assign to this agent.

It is recommend to leave the Reviewer as blank, unless you are wanting to restrict access to the recordings. Selecting a reviewer (another user) will limit that user only to be able to see recording made by the Agent you have currently created.

Click on **Create Agent** when finished

Call Record Web Portal

SIGN OUT

Dashboard > Agent Management > Create Agent

Welcome
Alex Grant

Dashboard

Recordings

Analytics

Personnel

Agents

Departments

Users

Roles

Reports

Payment & Billing

Configuration

Create Agent

Name (required)
Henry Jackson

Department
Select Department

Numbers
Select Numbers

☐ 0113

Select Reviewers

CREATE AGENT

CANCEL

You can **Delete** an **Agent** by clicking on the Delete icon on the **Agent Management** page. Deleting an Agent will not delete any recordings.

🕒 Revision #3

★ Created Mon, Jan 18, 2021 1:17 PM by [Admin](#)

✎ Updated Tue, Jan 19, 2021 10:11 AM by [Admin](#)